

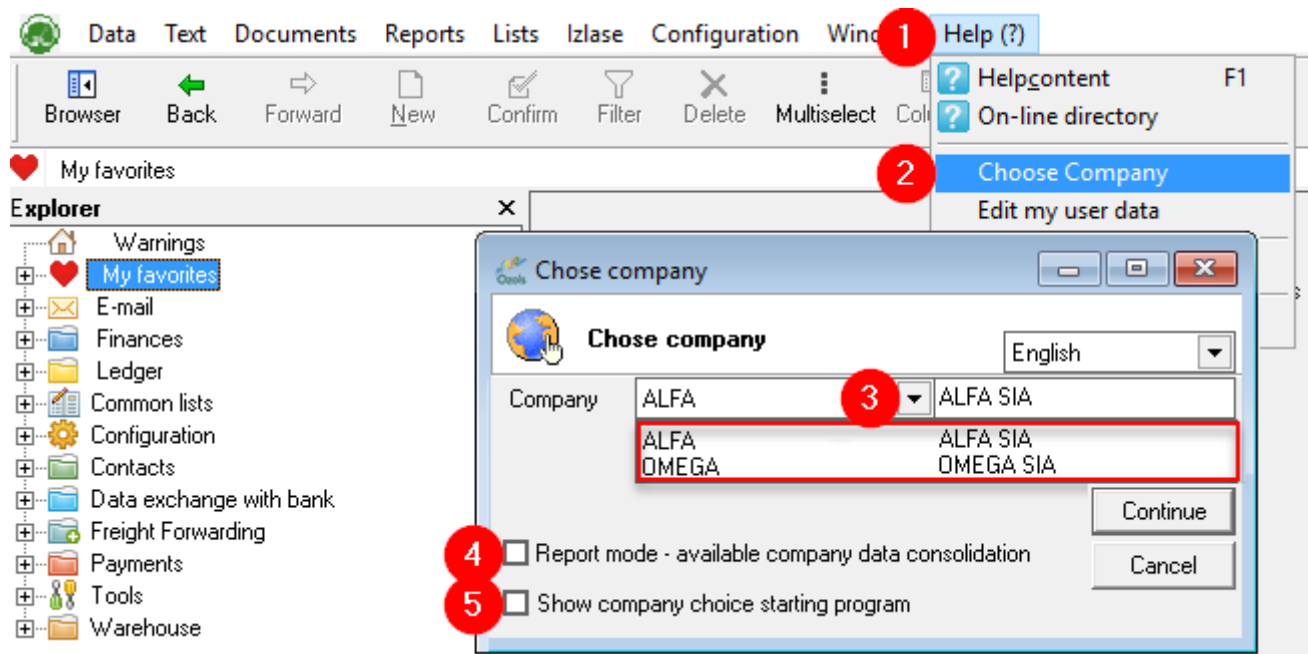
Work with several companies

How to work if you have access to several company data bases?

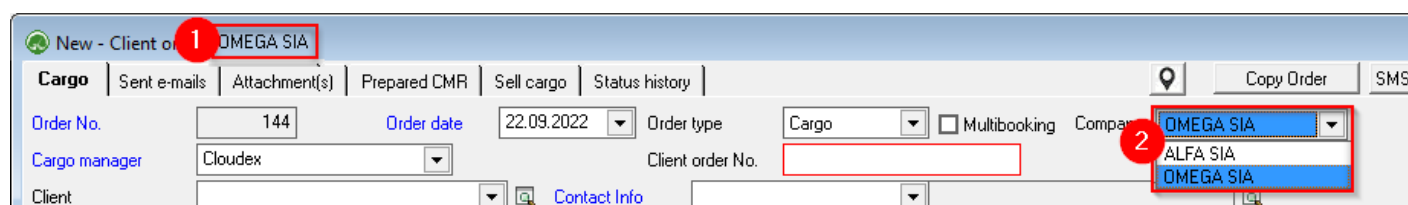
1. [Switching between companies](#)
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7. Working with separate databases of several companies

1. Switching between companies

1. Help
2. Choose company
3. Select desired company
4. If you check ☒ the Consolidation, the data of all companies will be displayed together. If not, they will be separated!
5. If you check ☒ the option to choose the company will be given when opening OZOLS TMS



2. Choose the company in the New Customer's order



3. Set the default company for the cooperation Partner

It is possible for you to determine which of your companies to use by default in cooperation with the specific Partner.

1. Open **the Partner card**;
2. Open the **Other data** section;

3. Select **Default Company**.

1 New - Partner

Basic Data **2** Other Data For bookkeeping Other Attachment(s) Sales

Bank	Bank Account	SWIFT	Currency

☐ Add
☐ Open
☐ Delete

☐ Advance pers... ☐ Circles ☐ Down trader ☐ Full loads ☐ Recipient ☐ Terminal
☐ Approved ☐ Client. ☐ End customer ☐ Make monthly... ☐ Sender ☐ Terminal agre...
☐ Carrier ☐ Customs office ☐ Expeditor com... ☐ Partial loads ☐ Supplier ☐ Use myShipm...

Carrier price, 1km / CMR insurance till Insured trucks ☐

Send invoices to Fuel surcharge %

Payment currency EUR Credit Limit EUR Agreement No.

Prohibit orders acceptance if max payment delay is more than 0 d **3** Default company

Term of payment 30 days Term of payment for incoming invoices 40 dienās

Skonto discount % Skonto discount on incoming invoices %

Bank account group [Default] CMR 16 pos.show Our company

Order view on invoice 1. Detailed order info Post 7 days

Addresses view in invoice Street, Postal code, City

Cargo descript view Full cargo description

☐ Hide loading/delivery date on invoice ☐ Negrupēt multibooking pakalp.rēķinā ☐ Prohibit data entry
☐ Hide sender and receiver on invoice ☐ In invoice order data print in supplement ☐ Print order without scanned signature
☐ Hide base currency sum on invoice ☐ Print invoices with signature ☐ Client himself issues invoices (self-billing)
☐ Show client debit/credit in invoice ☒ Calculate Penalty Interest for Contracts

Save Cancel

4. Access shortcut to database of the other company

If you have two or more companies with separate OZOLS TMS access , it is possible to create a shortcut to each of these companies. Instructions can be found [here](#) .

5. How to change the company for a created order?

If you have several companies available and you have entered the Customer's order and/or Trip/Expedition **to the wrong company**

1. Open **the Customer's order or Trip/Spedition**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**

5. **!!! Close the Customer's order or Trip/Spedition by pressing the Cancel button !!!**

Klienta pasūtījums - Uzņēmums

Dok.numurs: 0

Paskaidrojums:

Uzņēmums: OMEGA SIA (highlighted with red circle 3), ALFA SIA, OMEGA SIA

Labot (highlighted with red circle 4)

Atcelt

!!!

Saglabāt (crossed out)

Aizvērt (highlighted with red circle 5)

If the Invoice is also already issued from the wrong company, it must be deleted and a new Invoice created after correcting the company (shift+F4).

6. How to change company for incoming invoice?

1. Open **the Customer's Incoming Invoice**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit** button
5. **!!! Close the Incoming invoice by pressing the Close button!!!**

Ienākošais rēķins - Uzņēmums

Dok.numurs: 189

Paskaidrojums:

Uzņēmums: OMEGA SIA (highlighted with red circle 3), ALFA SIA, OMEGA SIA

Labot (highlighted with red circle 4)

Atcelt

!!!

Saglabāt (crossed out)

Aizvērt (highlighted with red circle 5)

Revision #4

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